

Statement on Standards for CPE Programs (continued)

35. Only the portions of committee or staff meetings that are designed as programs of learning and comply with these standards qualify for CPE credit.
36. **Standard No. 13. CPE credit for self-study learning activities must be based on a pilot test of the average completion time.**
37. **Commentary.** A sample of intended professional participants should be selected to test program materials in an environment and manner similar to that in which the program is to be presented. The sample group of at least three individuals must be independent of the program development group and possess the appropriate level of knowledge before taking the program. The sample does not have to ensure statistical validity. CPE credits should be recommended based on the average completion time for the sample. If substantive changes are subsequently made to program materials further pilot tests of the revised program materials should be conducted to affirm or amend, as appropriate, the average completion time.
38. **Standard No. 14. Instructors or discussion leaders of learning activities should receive CPE credit for both their preparation and presentation time to the extent the activities maintain or improve their professional competence and meet the requirements of these CPE standards.**
39. **Commentary.** Instructors, discussion leaders, or speakers who present a learning activity for the first time should receive CPE credit for actual preparation time up to two times the number of CPE credits to which participants would be entitled, in addition to the time for presentation. For example, for learning activities in which participants could receive 8 CPE credits, instructors may receive up to 24 CPE credits (16 for preparation plus 8 for presentation). For repeat presentations, CPE credit can be claimed only if it can be demonstrated that the learning activity content was substantially changed and such change required significant additional study or research.
40. **Standard No. 15. Writers of published articles, books, or CPE programs should receive CPE credit for their research and writing time to the extent it maintains or improves their professional competence.**
41. **Commentary.** Writing articles, books, or CPE programs for publication is a structured activity that involves a process of learning. For the writer to receive CPE credit, the article, book, or CPE program must be formally reviewed by an independent party. CPE credits should be claimed only upon publication.
42. **Standard No. 16. CPE credits recommended by a CPE program sponsor of independent study must not exceed the time the participant devoted to complete the learning activities specified in the learning contract.**
43. **Commentary.** The credits to be recommended by an independent study CPE program sponsor should be agreed upon in advance and should be equated to the effort expended to improve professional competence. The credits cannot exceed the time devoted to the learning activities and may be less than the actual time involved.

Standards for CPE Program Reporting

44. **Standard No. 17. CPE program sponsors must provide program participants with documentation of their participation, which includes the following:**
- ◆ CPE program sponsor name and contact information.
 - ◆ Participant's name.
 - ◆ Course title.
 - ◆ Course field of study.
 - ◆ Date offered or completed.
 - ◆ If applicable, location.
 - ◆ Type of instructional/delivery method used.
 - ◆ Amount of CPE credit recommended.
 - ◆ Verification by CPE program sponsor representative.

Statement on Standards for CPE Programs (continued)

45. Commentary. CPE program sponsors should provide participants with documentation to support their claims of CPE credit. Acceptable evidence of completion includes:

- ◆ For group and independent study programs, a certificate or other verification supplied by the CPE program sponsor.
- ◆ For self-study programs, a certificate supplied by the CPE program sponsor after satisfactory completion of an examination.
- ◆ For instruction credit, a certificate or other verification supplied by the CPE program sponsor
- ◆ For a university or college course that is successfully completed for credit, a record or transcript of the grade the participant received.
- ◆ For university or college non-credit courses, a certificate of attendance issued by a representative of the university or college.
- ◆ For published articles, books, or CPE programs, (1) a copy of the publication (or in the case of a CPE program, course development documentation) that names the writer as author or contributor, (2) a statement from the writer supporting the number of CPE hours claimed, and (3) the name and contact information of the independent reviewer(s) or publisher.

46. Standard No. 18. CPE program sponsors must retain adequate documentation for five years to support their compliance with these standards and the reports that may be required of participants.

47. Commentary. Evidence of compliance with responsibilities set forth under these Standards which is to be retained by CPE program sponsors includes, but is not limited to:

- ◆ Records of participation.
- ◆ Dates and locations.
- ◆ Instructor names and credentials.
- ◆ Number of CPE credits earned by participants.
- ◆ Results of program evaluations.

Information to be retained by developers includes copies of program materials, evidence that the program materials were developed and reviewed by qualified parties, and a record of how CPE credits were determined.

48. For CPE program sponsors offering self-study programs, appropriate pilot test records must be retained regarding the following:

- ◆ When the pilot test was conducted.
- ◆ The intended participant population.
- ◆ How the sample was determined.
- ◆ Names and profiles of sample participants.
- ◆ A summary of participants' actual completion time.

Section 400

Glossary

01. **Advanced.** Learning activity level most useful for individuals with mastery of the particular topic. This level focuses on the development of in-depth knowledge, a variety of skills, or a broader range of applications. Advanced level programs are often appropriate for seasoned professionals within organizations; however, they may also be beneficial for other professionals with specialized knowledge in a subject area.
02. **Basic.** Learning activity level most beneficial to CPAs new to a skill or an attribute. These individuals are often at the staff or entry level in organizations, although such programs may also benefit a seasoned professional with limited exposure to the area.
03. **Continuing Professional Education (CPE).** An integral part of the lifelong learning required to provide competent service to the public. The set of activities that enables CPAs to maintain and improve their professional competence.
04. **CPE credit.** Fifty minutes of participation in a group, independent study or self-study program. One-half CPE credit increments (equal to 25 minutes) are permitted after the first credit has been earned in a given learning activity.
05. **CPE program sponsor.** The individual or organization responsible for setting learning objectives, developing the program materials to achieve such objectives, offering a program to participants, and maintaining the documentation required by these standards. The term CPE program sponsor may include associations of CPAs, whether formal or informal, as well as employers who offer in-house programs.
06. **Evaluative feedback.** Specific response to incorrect answers to questions in self-study programs. Unique feedback must be provided for each incorrect response, as each one is likely to be wrong for differing reasons.
07. **Group program.** An educational process designed to permit a participant to learn a given subject through interaction with an instructor and other participants either in a classroom or conference setting or by using the Internet.
08. **Independent study.** An educational process designed to permit a participant to learn a given subject under a learning contract with a CPE program sponsor.
09. **Instructional methods.** Delivery strategies such as case studies, computer-assisted learning, lectures, group participation, programmed instruction, teleconferencing, use of audiovisual aids, or work groups employed in group, self-study, or independent study programs.
10. **Intermediate.** Learning activity level that builds on a basic program, most appropriate for CPAs with detailed knowledge in an area. Such persons are often at a mid-level within the organization, with operational and/or supervisory responsibilities.
11. **Internet-based programs.** A learning activity, through a group program (Paragraph .07 above) or a self-study program (Paragraph .22 following), that is designed to permit a participant to learn the given subject matter via the Internet. To qualify as either a group or self-study program, the Internet learning activity must meet the respective standards.
12. **Learning activity.** An educational endeavor that maintains or improves professional competence.

Statement on Standards for CPE Programs (continued)

- 13. Learning contract.** A written contract signed by an independent study participant and a qualified CPE program sponsor prior to the commencement of the independent study that:
1. Specifies the nature of the independent study program and the time frame over which it is to be completed, not to exceed 15 weeks.
 2. Specifies that the output must be in the form of a written report that will be reviewed by the CPE program sponsor or a qualified person selected by the CPE program sponsor.
 3. Outlines the maximum CPE credit that will be awarded for the independent study program, but limits credit to actual time spent.
- 14. Learning objectives.** Specifications on what participants should accomplish in a learning activity. Learning objectives are useful to program developers in deciding appropriate instructional methods and allocating time to various subjects.
- 15. Learning plans.** Structured processes that help CPAs guide their professional development. They are dynamic instruments used to evaluate and document learning and professional competence development. This may be reviewed regularly and modified, as CPAs' professional competence needs change. Plans include:
- A self-assessment of the gap between current and needed knowledge, skills, and abilities;
 - A set of learning objectives arising from this assessment; and
 - Learning activities to be undertaken to fulfill the learning plan.
- 16. Overview.** Learning activity level that provides a general review of a subject area from a broad perspective. These programs may be appropriate for professionals at all organizational levels.
- 17. Personal development.** A field of study that covers such skills as communications, managing the group process, dealing effectively with others, interviewing, counseling, and career planning.
- 18. Pilot test.** Sampling of at least three independent individuals representative of the intended participants to measure the average completion time to determine the recommended CPE credit for self-study programs.
- 19. Professional competence.** Having requisite knowledge, skills, and abilities to provide quality services as defined by the technical and ethical standards of the profession. The expertise needed to undertake professional responsibilities and to serve the public interest.
- 20. Program of learning.** A collection of learning activities that are designed and intended as continuing education and that comply with these standards.
- 21. Reinforcement feedback.** Specific responses to correct answers to questions in self-study programs. Such feedback restates why the answer selected was correct.
- 22. Self-study program.** An educational process designed to permit a participant to learn a given subject without major involvement of an instructor. Self-study programs use a pilot test to measure the average completion time from which the recommended CPE credit is determined.
- 23. Update.** Learning activity level that provides a general review of new developments. This level is for participants with a background in the subject area who desire to keep current.

- 01. Final examination expiration date.** Refers to the time in which each learner must complete the final examination. To ensure that learners are getting CPE for relevant learning, they should be given an expiration date of one year, from date of purchase, to complete the final examination if they desire to receive CPE credit.
- 02. Instructional Materials.** Quality teaching materials which are written for instructional, educational purposes. Such materials must follow the logical progression of learning. In general, these materials should make the person who is reading them understand the subject.
- 03.** These materials must demonstrate the expertise of the author(s). At a minimum, instructional materials must include the following items: table of contents, instructions, learning objectives, study guide (which may also include outlines and other explanations), index, exhibits (e.g., examples), glossary/key word definitions, self-study questions, exercises and a final exam. Appropriate solutions must be provided for all exhibits, self-study questions and exercises. These solutions must include the correct answer, and provide logical reasoning as to (1) why that answer is correct and (2) why the other answer is wrong.
- 04.** All materials must be cohesive, reflecting a well-planned design from start to finish. All materials must clearly be written for instructional purposes.
- 05. Program publication/revision date.** Refers to the course itself. Course content should be brought up to date regularly. Courses should be revised as soon as feasible following changes to relative codes, laws, rulings, decisions, interpretations, etc. Courses in subjects that undergo frequent changes should be reviewed by a subject matter specialist, at least once a year, to verify the currency of the content. Other courses should be reviewed at least every two years.
- 06. Textbook.** Quality books written by author(s) who are not connected with the CPE provider. Sponsors must demonstrate that such books are written for instructional, educational purposes. Textbooks are an acceptable example of supplementary, instructional materials, provided that materials in the instructional materials are also included. Textbooks are NOT an acceptable example of instructional materials if the book is primarily to be used as a reference manual. The difference between the two uses is not always clear.
- 07. Timeliness.** For courses undergoing rapid changes, the shelf life of courses in such subjects will be one year from the time of initial release, unless the subject matter changes before the year has elapsed. For all other courses, including those not undergoing rapid change, the shelf life will be two years from the time of initial release.



a service of the National Association of State Boards of Accountancy

STATE BOARDS OF ACCOUNTANCY THAT WILL ACCEPT CPE CREDITS FROM NATIONAL REGISTRY OF CPE SPONSORS:

Alabama
Alaska
Arkansas¹
California
Colorado
Delaware¹
District of Columbia
Hawaii
Idaho
Indiana
Kansas²
Kentucky
Louisiana³
Maine
Massachusetts
Michigan
Minnesota
Mississippi
Missouri

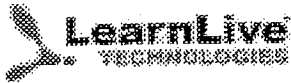
Nevada
New Hampshire
New Jersey
New Mexico
New York
North Carolina
North Dakota
Ohio
Oklahoma
Pennsylvania
Puerto Rico¹
Rhode Island
South Carolina
Tennessee¹
Texas
Vermont
Virginia
West Virginia¹
Wyoming

¹ Requires course providers to be members of the National Registry of CPE Sponsors.

² Requires that all self-study CPE program providers must be approved by either a state society, the AICPA, NASBA's National Registry of CPE Sponsors or NASBA's Quality Assurance Service (QAS).

³ Requires only interactive self-study course providers to be members of the National Registry of CPE Sponsors.

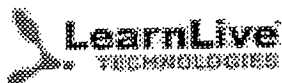
**State boards of accountancy have final authority on
the acceptance of individual courses for CPE credit.
Please see attached page for special requirements of
state boards of accountancy for CPE course providers.**



Responses to the California State Board of Accountancy

1. *How will participant attendance be recorded and ensured for the full 8-hour period?*
 As with all of our webcasts, there are a minimum of three (3) polling interactions for the first credit hour and four (4) each hour thereafter. Participation in both the interactive elements and the "Question and Answer" function creates a date and time stamp in our electronic documentation. After the webcast has ended, we check these records to determine if each registrant participated fully before granting credit for the webcast.
2. *Is late arrival (logon) or early departure (logoff) permitted?*
 No. All participants should be logged on five (5) minutes before the webcast begins. Participants will not be granted credit if they are more than 9 minutes late for the webcast start. Early departure is also not permitted.
3. *How are breaks administered?*
 Five minute breaks will occur once per hour. Participants will not log off, but will have that time to stretch etc.
4. *How will the certificates of completion be awarded/distributed?*
 After the webcast has ended, a LearnLive Technologies staff person reviews the electronic records for each participant individually. Those who have participated adequately in the webcast (answering at least 80% of the interactions and using the "Question and Answer" function) will be granted credit for the webcast. We send all participants an email after the webcast to inform them of their Pass/Fail status. Participants may print their certificate of completion from their LearnLive University account after completing a webcast evaluation. Certificates of completion are available in the participant's account indefinitely.
5. *What happens in the event of a power/system failure (isolated or event wide)?*
 If there is an isolated system failure, the registrant will receive a full refund and will be directed to other courses to fulfill their needs. If the failure is system wide but short, the program will resume and each participant will be contacted by phone to provide them assistance. If a system wide failure is longer than 5 minutes, the program will be cancelled and rescheduled. Each participant will be contacted by phone and offered a full refund in the event of a system-wide failure. It should be noted that we have a variety of back-up systems and consequently we have not had a system-wide failure in the two years we have been in business.

6. *How will the speaker (Art Ramudo) accept and respond to comments from participants?*
Our webcast delivery platform and user interface include a "Question and Answer" function. Participants can type in a question for the instructor at any time during the webcast. Instructors answer the questions several times during each hour of a webcast.
7. *How is interactive course participation validated/achieved?*
As each person completes an interaction, a date and time stamp is created electronically in our monitoring system. After the webcast is completed we check the electronic records for each registrant to ensure their participation in the interactions.
8. *Please provide feedback from previous clients/users related to the quality and effectiveness of this type of learning program/environment.*
I have attached a spreadsheet of evaluation averages for recent webcasts we have hosted.



Webcast Overview

LearnLive Technologies presents webcasts based on research into e-learning strategies. Most offerings by online CPE companies place an emphasis on quantity, despite claims to the contrary. Our methodology and content gives the participant the highest quality interactive group-study CPE experience possible.

About Webcasts

Webcasts are live, interactive presentations. We use the latest technology to allow individuals to participate from their own computer in a live, group-study presentation. An instructor leads the presentation, through live video and audio streaming, while presenting course slides. Interactions, such as polling questions and brainstorming sessions, are interspersed throughout the presentation to enhance the learning experience. There is a "Question and Answer" feature that allows the participants to pose questions to the instructor throughout the webcast.

Experts

Our approach involves subject-matter experts and instructional experts working together efficiently to create an effective interactive group-study course. LearnLive Technologies has developed guidelines for webcasts based on the experience of several well-known instructors. We have hired and trained course designers with experience in education, technical writing and graphic design who work closely with our expert accounting and finance professionals to create an excellent learning experience.

Structure

All webcasts have a similar structure. This serves several purposes. First, students can enroll in multiple webcasts and feel a comfortable continuity with the presentation of the material. A well-defined overall structure for the webcasts means that the student only needs to learn the structure itself once. It is important that the student spends most of her time learning the material—not the delivery mechanism.

The structure that works for LearnLive Technologies can be summarized as follows:

- Each hour of a webcast is divided into individual sections of three to 15 slides. This ensures that the student is not overwhelmed with the material.
- Each hour of a webcast has three to five sections.
- Each section includes an interactive poll or brainstorm. An interaction is an excellent way to engage the students and let them exercise their newfound knowledge. Answering an interaction reinforces the information, giving it stronger roots in the student's mind, and ensures that the student is still present

and involved in the webcast presentation. This will be covered further in the next section.

- There is a "Question and Answer" button allowing participants to send questions directly to the instructor during the webcast. These questions are answered at several times during each hour of a webcast.
- Each webcast includes materials for the participants to refer to during the live webcast.

Interactions

Another key aspect of e-learning is user interaction with the course. In order to learn, the student must be engaged and active in the learning process. Our interactive elements in the webcast are a particularly good way to reinforce the material and allow all participants to see what others think on a subject.

In addition to enhancing the learning process, our interactions provide us with a time-stamped record of each registrant's participation in the webcast. This ensures that they are engaged and haven't left their computer running while doing other things.

Conclusion

A high-quality, online, interactive group-study CPE experience requires carefully thought-out webcasts that follow rules and guidelines that are unique to this new medium. The criteria discussed in this document, are based on years of research and experience and can be summarized as follows:

- Webcasts are based on content from experts in the field and created by experts in the field.
- Webcast content is checked by instruction experts with experience in instructional design.
- The webcast structure is well thought-out and consistent.
- The user interface is easy to use and consistent for each course.
- Webcasts require regular interaction with the participant.



Webcast Creation – Step by Step

1. Contact subject expert regarding topic.
2. Work with subject expert/instructor to create a title, choose a date, and time for webcast.
3. Develop a course description. This must include:
 - a. Benefits/ short general course description
 - b. Major Subjects covered
 - c. Objective of the course
 - d. Designed for
 - e. Prerequisites
 - f. Level
 - g. Field of Study
 - h. Length/number of CPE credits
 - i. Short bio on the instructor
4. Webcast is loaded into the LearnLive University system. The Universities will automatically generate and send an email confirmation to the participants upon registration.
5. Expert Instructor creates course content. This includes a PowerPoint presentation, course handouts, and self-study conversion questions.
 - a. We require that, at minimum, the author include three (3) polling interactions into the presentation for the first credit hour and four (4) each hour thereafter. These can include any of our interactive features including Polling, V-chart, Brainstorm, Pro/Con or Certifier. These interactions are used to track a student's active participation throughout the web cast; a requirement for Internet-Based Group Study.
 - b. Course handouts can include the PowerPoint slides or materials developed separately. In either case, the materials should supplement the webcast and provide a valuable take away for the participants.
 - c. Instructor submits the PowerPoint and handout materials for a quality control check. An Instructional Design Expert uploads and prepares the materials for broadcast.
 - d. If the webcast is going to be converted into a self-study course, the subject expert will need to develop self-study questions. We ask that the instructor create 5 quiz questions and 5 final exam questions for each hour of course credit being offered. Therefore, if the webcast is going to be converted into a two hour self-study course, we ask for 10 quiz questions and 10 final exam questions. All of the questions should be multiple choice. Quiz questions need to have the rationale for each answer, correct and incorrect. We will also need to know what section they pertain to so that they can be inserted into the material appropriately. Final exam questions do not

require a rationale, but they can not be the same as any of the quiz questions.

6. A dry run of the webcast is setup with the instructor 1 to 7 days before the course date.
7. 24-hrs prior to the event the participant is sent a reminder email detailing the date, time, course title and all required documents for the event.
8. Webcast Broadcast occurs live.
9. Within 24-48 hours a LearnLive Representative verifies active participation and will Pass/Fail each participant based on their participation. The System again generates an email and notifies each person of their Pass or Fail status. Those that Pass will have access to a webcast evaluation and the certificate of completion. Certificates of completion are maintained in each individual's account and may printed at any time.

**CALIFORNIA BOARD OF ACCOUNTANCY**

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Attachment C



**COMMITTEE ON PROFESSIONAL CONDUCT
MINUTES OF THE MEETING**

FINAL

July 20, 2006
Crowne Plaza LAX
5985 West Century Blvd.
Los Angeles, CA 90045

CALL TO ORDER

The meeting of the Committee on Professional Conduct (CPC) was called to order at 9:00 a.m. by David Swartz, Chair. Mr. Swartz introduced and welcomed David Tolkman representing the Society of California Accountants and Charlene Zettel, Director of the Department of Consumer Affairs.

Mr. Swartz then indicated that to ensure compliance with the Bagley-Keene Open Meeting Act, Section 11122.5(c)(6), if a majority of members of the full Board are present at a committee meeting, members who are not members of that committee may attend that meeting only as observers. The Board members who are not committee members may not sit at the table with the committee, and may not participate in the meeting by making statements or by asking questions of any committee members.

Present:

David Swartz, Chair
Ronald Blanc
Richard Charney
Donald Driftmier
Clifton Johnson
Robert Petersen
Renata Sos

Staff and Legal Counsel

Mary Crocker, Assistant Executive Officer
Patti Franz, Chief, Licensing Division
Michael Granen, Deputy Attorney General
Gregory Newington, Chief, Enforcement Division
George Ritter, Legal Counsel

She further indicated that Mr. Granen had suggested that the words "whether in physical or electronic form" be deleted. Mr. Granen added that he believed these were unnecessary and could be confusing. Mr. Driftmier expressed support for deleting the words "whether in physical or electronic form" and agreed with Mr. Granen regarding how this wording could be confusing.

Ms. Wong then noted that the final proposed change was to indicate that additions, with proper documentation, are permitted after the end of the document assembly period. She explained that proposed subsection (c) of Section 68.4 contains this provision and specifies the documentation required. Ms. Wong added that Attachment 1 to the July 10, 2006, memo included language for subsection (c). However, revised language, recommended by staff, was provided by e-mail to the CPC, the Board and the public (**Attachment 5**). She indicated that the revised language was suggested by Mr. Granen to improve the readability of the provision.

After the CPC reviewed the three memos referenced by Ms. Wong, it was moved by Mr. Driftmier and seconded by Mr. Petersen to accept the proposals as recommended by staff with the deletions of the words "whether in physical or electronic form" in Section 68.4(b).

Ms. Sos then commented that she was in support of the motion with regard to the amendments to Section 68.3, and subsections (a) and (c) of Section 68.4. Also, she was pleased to see that the proposed amendment to Section 68.4(b) retained much of the language that was previously in the definition of changes in audit documentation. However, she believed the language in the last sentence of Section 68.4(b) was not consistent with other provisions in the proposal. She suggested deleting "documents added to the file" and substituting "additions to audit documentation" for improved clarity and consistency. **Mr. Driftmier agreed to amend his motion to include the revision suggested by Ms. Sos. Mr. Petersen, seconder of the motion, agreed. The motion was unanimously carried.**

IV. Proposed Regulatory Language Related to Webcast Continuing Education Courses.

Ms. Franz reported that, at its November 2005 meeting, the Board adopted a CPC recommendation to accept as qualifying continuing education (CE) courses taken over the Internet via Webcasts which are consistent with Board's requirements for live presentation CE. She noted that a notice to licensees had been posted on the Board's Web site indicating that they may complete this type of continuing education course. Also, proposed amendments to Sections 88, 88.1, 88.2, and 89 of the Board's regulations to implement the recommendation have been included with the agenda materials for the meeting (**Attachment 6**). She indicated that these regulations include requirements to ensure that licensees who participate in Webcast courses are actually present during the entire course and interacting with the course instructor. These regulations also provide for lead time to allow providers to come into compliance with the requirements and licensees to receive information regarding the Webcast option. Ms. Franz concluded her comments by indicating that these regulation changes, if

approved by the CPC and the Board, will move forward for hearing in the fall of this year.

During the discussion, Ms. Franz clarified that the proposed changes are consistent with CE standards developed by the National Association of State Boards of Accountancy and with procedures used by LearnLive Technologies, the CE provider who first brought Webcast CE to the Board's attention.

Dr. Charney asked what would happen if a licensee in a home environment has to stop taking the course. He suggested that perhaps the licensee would be permitted to continue with a recorded version of the course. Ms. Franz indicated the licensee would not be allowed to continue and receive credit for the course as Webcast CE. The Webcast format is intended to mirror what one would receive in a live presentation course. She clarified that if, during a live presentation course, someone had a personal emergency and had to leave, regrettably the person would not receive CE credit for that course. She added that there is a potential risk that there could be a disruption in technology that has nothing to do with the person taking the course. However, responsible providers generally have methods in place to ensure that there are minimal interruptions.

It was then moved by Ms. Sos, seconded by Dr. Charney, and unanimously carried to recommend that the Board approve the proposed revisions to Sections 88, 88.1, 88.2, and 89 of the Board's regulations related to Webcast CE.

V. Proposed Web Site Message Related to Temporary/Incidental Practice.

Ms. Crocker reported that AB 1868 contains a provision reinstating a form of temporary/incidental practice. She noted that, when that bill is enacted, it will be important to post information on the Board's Web page to assist in communicating with licensees and other interested parties. She added that language has been crafted for that purpose and it is being provided for the CPC's consideration (**see Attachment 7**). Ms. Crocker then suggested some edits to the language. In the second paragraph, she recommended striking the reference to the Chair of the Senate Committee on Business, Professions and Economic Development" and beginning the paragraph by saying "The Board is in the process of developing regulations." She also suggested inserting the word "above" after subdivision (b) of Section 5050, so that the reader will know where to look for the language.

Ms. Sos expressed concern that the language indicates that the Board is reinstituting the same form of temporary/incidental practice that existed previously. She indicated that was an inaccurate message, and that the Board was instituting a carefully constructed, limited form of temporary/incidental practice. Ms. Sos then suggested the following revisions: 1) in the first sentence, indicate the Board is instituting a limited form of temporary/incidental practice that is subject to particular requirements; 2) after the statutory language, specify the restrictions which are that those practicing under temporary/incidental practice may not solicit California clients and may not assert or